Opportunity Online Hardware Grant
Information and Tips:

A. Background information:

The goal of this program is to help libraries build and practice the skills needed to sustain local funding for technology services and to motivate local governments to commit local funding to computer services. The foundation hopes to increase the percentage of U.S. public libraries regularly upgrading their public access computers from 60% to 90% through the Opportunity Online Hardware Grant program.

This program differs from the previous Gates Foundation programs; it includes a local funding match requirement and it provides funds to purchase PCs rather than the equipment itself.

The grant funds will be distributed to libraries through the State Library, contingent upon the libraries securing matching dollars over the term of the two-phase grant.   The match is 25% in Phase 1 and 50% in Phase 2. The purpose of the match is to use the foundations' grant dollars as a way to leverage and acquire additional local funding for maintaining free technology access in libraries – preferably in the form of a sustainable library budget item.

B. Guidelines:

Announcing Your Grant
Missouri's grant period begins July 1, 2009. When the Gates Foundation announced their 2009 awards to states on July 16, 2009, they provided a sample news release that has been forwarded as an e-mail attachment to libraries. The State Library will provide additional information that you may wish to add to your announcement within this Grant Administration manual. If you do not find the information you need, please contact Jean.Morrison@sos.mo.gov or Barbara.Reading@sos.mo.gov.

Basic Requirements for participating libraries:
1. Demonstrate a commitment to provide an escalating dollar match* over the two-year grant period (25% in 2010, 50% in 2011).
2. Participate in foundation-sponsored, PLA advocacy symposium November 4-5 in St. Louis, MO.
3. Complete the ALA-UMCP (Note the name change to American Library Association/University of Maryland College Park!) Internet and Public Funding Survey in 2009, 2010, and 2011.
4. Enter newly-purchased computers into the library's TechAtlas inventory.

Use the forms in this Grants Administration Manual to notify the State Library as requirements are completed.

Acceptable expenditures under "Cost of Ownership" for patron computers:
- Business-class computer(s) of your choice for public access:
  Must meet the State Library Minimum Specifications for Computer Equipment from
  http://www.sos.mo.gov/library/development/grants/computer_specs.asp. Check this
  site each year for current minimum specifications because specifications are reviewed
  annually at the end of each calendar year
  Desktop PC: 2.4 GHz Processor; 2 GB SDRAM Memory; 120GB Hard Drive;
  19" Flat Panel Monitor; 256 MB Graphics Card; CD-ROM/DVD-ROM drive (Blu-
  ray optional); LAN Networking Port
  Laptop PC: 2.0 GHz Processor; 2 GB Memory; 120 GB Hard Drive; 14" Display
  area; CD-ROM/DVD-ROM drive; LAN Networking Port and Wireless Capable (if
  wireless is available at the site)
- Extended warranties are allowed
- Repairs, upgrades over the life of the computer (expected to be 4-5 years)
- Software including Time and Print Management software are eligible purchases (we
  encourage libraries to consider purchase software from the non-profit TechSoup
  Stock at www.techsoup.org/go/library for deep discounts to make software
  affordable). See the flyer in section 7 of this manual.
- Any network upgrade that will allow the computer to be functional for patrons--
  running wire, setting up wireless, new hub, router, server, etc.)
- Printer, toner, ink, and printing supplies
- Payment for setup/installation of the computers--current employees can be paid if
  working outside contracted library hours
- Accessibility devices such as special keyboards and specialized mouse
- Staff training on the use of the new computers and software

If you have any questions about what is eligible, please e-mail them to
Jean.Morrison@sos.mo.gov or Barbara.Reading@sos.mo.gov or call (800) 325-0131
Extension 11 (for Jean) or 4 (for Barbara)

Grant Funds/Matching Funds:
- Matching funds may be local or state; private funds are OK; LSTA funds are not
- Acceptable sources of this match include:
  - Monies derived from fundraising efforts (e.g. book sales, library fundraisers,
    etc)
  - New and existing library technology budget funds derived from successful
    local and/or state advocacy efforts (excluding LSTA)
  - Nongovernmental donations or grants (e.g. private donors, community
    foundation grants, local business sponsors, etc)
- Match will be monitored and enforced through written documentation and
  verification as listed on the Matching Funds Verification form for each phase
- A library cannot use the Bill & Melinda Gates Foundation grant dollars to replace
  existing funds (supplant) previously committed to a library technology budget.
  Existing library unobligated funds can be used as matching funds
- Gates funds from Phase 1 cannot be used as matching library funds for Opportunity
  Online matching funds for Phase 2. Gates funds can be used as library matching

funds for LSTA grants for networking improvements, printers for patrons, and other patron devices—just NOT for patron computers.

C. <u>Questions</u>:

- *I only received funds for a couple of computers, can I buy them the first year then just use the second year money to buy associated extras like a new printer or software*?— Yes or you can save it for upkeep during future years. Life expectancy should be about 4-5 years. Libraries that purchase all computers the first year assume a risk that they may have difficulty in raising the 50% match for those computers during the second year.
- *What do I do with the money left over after purchasing the computers*? See Cost of Ownership above. We do not believe there will be any money left after the 4-year expected life, but if there is any money left above and beyond all you have spent during the life of the PC, the money can be used as the library wishes.
- *Is there a final report on how the money was spent*? The Gates Foundation does not require one. The State Library includes a survey for 2010 and 2011 in this manual for a "Lessons Learned" concluding document.
- *How did the Gates Foundation come up with the number of computers awarded?*
  1. The first step was a list of libraries that were known to the Gates Foundation. The State Library was asked to add new libraries and branches and remove closed ones from the list. This list included 2000 census Poverty data, last year's Free and Reduced Lunch data, and the most recently aggregated Unemployment rates. These were reviewed by the State Library, data errors were allowed to be changed, but not the years of the data.
  2. Last fall, a list of "Poverty eligible" libraries was given to the State Library. Each of these libraries was asked to enter inventory into TechAtlas.
  3. A consulting firm hired by the Gates Foundation analyzed each TechAtlas inventory to see what libraries were "Hardware Vulnerable." For this calculation, the number of up-to-date patron computers per poverty population was determined. The number of up-to-date computers available at the library was compared to the number needed. If the library did not have enough computers to meet the need of persons in poverty, workstations were offered to fill the gap.
- *Did the Gates Foundation consider different needs of libraries serving communities of different sizes?* The Gates Foundation used population data to divide libraries by population sizes, and a number of persons in poverty per computer was set using those figures: For Small libraries, 1 computer for every 150 persons in poverty; for Medium-sized libraries,1 computer for every 300 persons in poverty; and for Large libraries 1 computer for every 600 persons in poverty. The number of up-to-date computers was subtracted from that number so the number of new computers could be calculated.
- *I think our library should have been awarded more computers. Can I appeal the number awarded?* The Gates Foundation has indicated their decision is final. The State Library intends to continue offering LSTA grants to assist libraries with meeting technology needs; however the State Library will consider funding for <u>patron</u> computers to Gates recipient library <u>and</u> those libraries who willingly chose not to

participate as low priority grants until the end of the Gates grant life. Libraries meeting these two categories are eligible for LSTA grants for other than patron computer purchases.

- *Where can I find out more about the 'Turning the Page' advocacy training?* The grant requires each library to participate in "Turning the Page" advocacy training provided by the Public Library Association. This training is provided as a two-day in-person event, to be scheduled for fall, 2009. Travel expenses will be paid by the Gates Foundation. An online option is available for those libraries not able to attend the in person event. More information about this valuable training can be found at the Turning the Page website at: http://www.sustaininglibraries.org/. The FAQ tab is especially helpful in describing how this training supports the Opportunity Online Hardware Grant Program.
- *When will the training be held? How do I sign up?* The Public Library Association (PLA) plans to conduct training on November 4-5, 2009 in St. Louis. Dates and locations were announced by post card, e-mail, and mailed invitation. All room arrangements are made through PLA.